

PLAY



CORRY
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BOOK

P

PLAYBOOK



Private Coaching

This playbook is a tool for you to print and use in your coaching binder. You may print off as many copies of each template (page) as you require, or you can type directly into this digital copy.

Need help? Reach out to us for more guidance.

corryrobertson.com/contact



TABLE OF CONTENTS FOR YOUR TEMPLATES

BENCHMARKS

STEP 01

Big picture tracking of your goals beginning the program,

Print one description page, and as many goal worksheet pages as you need.

STEP 02

SMART GOALS

SMART GOAL PLANNER

STEP 03

Use this planner to drill down even further into your SMART goals.

Use your portfolio to track your success story. Duplicate the series for as many goals as you have set.

STEP 04

COACHING PORTFOLIO

PLANNER + HABIT TRACKER

STEP 05

Daily, monthly and weekly planner to help you stay organized.

DEFINE YOUR AREAS OF FOCUS

BENCHMARK

01

Describe your area of focus

What makes this important now?

What will be better when you're successful?

Possible obstacles

DEFINE YOUR AREAS OF FOCUS

BENCHMARK

02

Describe your area of focus

What makes this important now?

What will be better when you're successful?

Possible obstacles

DEFINE YOUR AREAS OF FOCUS

BENCHMARK

03

Describe your area of focus

What makes this important now?

What will be better when you're successful?

Possible obstacles

WHAT ARE SMART GOALS?

SMART GOALS

S

Specific

Specific means that your goal is detailed enough to explain how it is viable.

M

Measureable

Measurable means you can observe and track your progress towards the goal and describe and track your results.

A

Achievable

Achievable means you can describe HOW you will achieve your goals.

R

Realistic or Relevant

Relevant means you can describe what makes your goal important NOW.

T

Time-Framed

Time-framed means that you can track the goal in a set time frame. The progress of the goal can be seen weekly, monthly or yearly.

TRACK YOUR GOALS

MY SMART GOALS

SPECIFIC - What exactly do I want to do?

NOTE:

MEASURABLE - How will I track my progress?

NOTE:

ACHIEVEABLE - How is this attainable?

NOTE:

RELEVANT - Why am I doing this?

NOTE:

TIME-FRAMED - When will I have this completed?

NOTE:

SMART GOAL PLANNER

01

Your Goal:

Target Date:

Today's Date:

IDEA

ACTION

CHALLENGE

DATE
RESOURCE

02

IDEA

ACTION

CHALLENGE

DATE
RESOURCE

03

IDEA

ACTION

CHALLENGE

DATE
RESOURCE

COACHING PORTFOLIO

Use this portfolio to share your success story at the end of your coaching mandate. Recap your goals and report the results of your efforts.

WHAT WAS YOUR SMART GOAL, DESCRIBE WHAT YOU ACHIEVED

DATE STARTED

DATE ACHIEVED

DESCRIBE THE OUTCOME

PRESENTATION

COACHING PORTFOLIO

DESCRIBE THE IMPACT YOUR EFFORTS HAVE HAD ON YOURSELF,
YOUR TEAM, YOUR COMPANY AND FOR YOUR COMMUNITY

DESCRIBE THE LESSONS YOU HAVE LEARNED ALONG THE WAY

PRESENTATION

COACHING PORTFOLIO

WHAT DID YOU STOP DOING - WHAT DID YOU START DOING?

DESCRIBE WHAT YOU IMPROVED UPON

PRESENTATION

COACHING PORTFOLIO

WHAT GOALS DID YOU ACHIEVE DURING THIS PROCESS?

GIVE EXAMPLES OF HOW YOU BENEFITTED FROM YOUR EFFORT

GIVE EXAMPLES OF HOW THOSE AROUND YOU BENEFITTED FROM YOUR EFFORT

PRESENTATION

COACHING PORTFOLIO

EXPLAIN WHAT YOU WOULD LIKE TO WORK ON NEXT

WHAT ARE THE WINNING CONDITIONS, INCLUDING HELP, SUPPORT, OR RESOURCES THAT YOU NEED TO SUCCEED AS YOU MOVE FORWARD?

PRESENTATION

MONTHLY



MONTH: _____

HABITS

GOALS

1. _____
2. _____
3. _____

STOPS

1. _____
2. _____
3. _____
4. _____
5. _____

STARTS

1. _____
2. _____
3. _____
4. _____
5. _____

NOTES:

WEEKLY

LOG YOUR EFFORTS AND PRACTICE

MON

TUE

WED

THU

FRI

SAT

SUN

Date:

-  WHAT I DID WELL
-  WHAT I STRUGGLED WITH
-  QUESTIONS I HAVE
-  FRUSTRATIONS I HAVE
-  WINS!

Notes:

DAILY

PLANNER



M T W T F S S
● ● ● ● ● ● ●

Date: _____

TO DO LIST

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____

PRIORITIES

COACHING APPOINTMENTS

NOTES

IDEAS

COACHING HANDBOOK

NOTES

DATE	TOPIC
NOTES	
RECOMMENDATIONS	

“Coaching is partnering with another person in a thought-provoking and creative process that inspires them to maximize their personal and professional potential, which is particularly important in today’s uncertain and complex environment. Coaches honour the other person as the expert in their life and work and believe that they are creative, resourceful and whole. Standing on this foundation, the coach’s responsibility is to discover, clarify, and align with what the person wants to achieve, encourage self-discovery, elicit solutions and strategies generated by the other person (not the coach), and hold the person responsible and accountable.

This process helps people dramatically improve their outlook on work and life while drawing out their skills and unlocking their potential.”

- Corry Robertson

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